Three-tenths (29%) of American households did at least one home improvement project in the past year, one-fourth (27%) expect to undertake such projects in the next 12 months, and 9 percent plan to do some home improvement work, although not in the next year (see Table 1.1). (Respondents could be classified into more than one of the above responses.) The remaining one-half (50%) of all households have no current plans for improving their homes.

As expected, upper-income ($30,000+) respondents were more likely than their counterparts to have done some home improvement projects in the past 12 months and to plan to do some of this work in the upcoming 12 months.* Homeowners, adults between the ages of 35 and 49, and residents of the west were also more likely than others to have done a home improvement project and to expect to undertake one in the next 12 months. People in one-person households and the unemployed were less likely to have undertaken projects in the past year and to be planning them for the next 12 months.

Those who read a Sunday paper (33%) and frequent weekday paper readers (31%) were both more likely than infrequent weekday readers (27%) to have undertaken home improvement activities in the past 12 months.

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* See Appendix Table A.1 for respondent bases and Appendix Table A.2 for demographic profiles of those who did projects or planned to do them.

Table 1.1

HOME IMPROVEMENT PROJECTS UNDERTAKEN OR PLANNED
AMONG DEMOGRAPHIC GROUPS

	Done-Past 12 Months	Planned-Next 12 Months	Planned-More Than 12 Months	No Plans	DK/NA
Total	29%	27%	9%	50%	3%
By Income					
Under $15,000	14%	10%	4%	76%	3%
$15,000-$19,999	27	28	6	51	1
$20,000-$29,999	27	29	12	48	4
$30,000-$39,999	40	42	11	38	3
$40,000+	45	37	11	32	2
By Age					
18-24	26	26	8	52	3
25-34	33	33	13	42	5
35-49	38	39	12	34	4
50-64	33	25	6	51	1
65+	14	7	2	78	3
By Sex					
Male	30	29	9	48	3
Female	29	25	9	51	3
By Region					
Northeast	29	28	10	50	3
North central	28	28	8	50	4
South	28	23	7	54	5
West	34	33	12	43	1
By Home Ownership					
Own	35	31	10	42	3
Rent	16	18	6	68	4
By Household Size					
One	14	14	5	68	2
Two	31	22	8	54	1
Three	31	35	8	42	5
Four or more	36	36	13	36	3
By Number Working					
None	18	12	4	69	3
One	29	27	9	50	2
Two or more	36	37	12	36	3

(Continued)

Table 1.1

HOME IMPROVEMENT PROJECTS UNDERTAKEN OR PLANNED
AMONG DEMOGRAPHIC GROUPS
(Continued)

	Done-Past 12 Months	Planned-Next 12 Months	Planned-More Than 12 Months	No Plans	DK/NA
Total	29%	27%	9%	50%	3%
Did Home Improvement Projects In Past 12 Months	100%	44%	13%	-%	-%
DIY only	100	50	14	-	-
Contractor only	100	29	12	-	-
Both	100	39	12	-	-
DIY (Net)	100	48	14	-	-
Contractor (Net)	100	32	12	-	-
Plan Home Improvement Projects For Next 12 Months	47	100	15	-	-
By Newspaper Readership					
Frequent reader*	31	26	9	50	2
Infrequent reader*	27	29	9	50	5
Past Sunday reader	33	29	9	47	3

* Frequent readers are defined as those who read 4 or all 5 Monday-through-Friday editions of a daily newspaper. Infrequent readers are those who read 0 through 3 weekday editions of the daily paper.

Question: "Now, I would like to talk about some of the large and small home improvement projects for homes and apartments. These projects could be as small as replacing a faucet, painting the inside or outside of your home or adding a room to your house. Which one or more of these statements describes home improvement projects around your house?" (STATEMENTS): We undertook home improvment projects in the past 12 months; We're planning to undertake home improvement projects during the next 12 months; We're planning home imrprovement projects for more than 12 months from now; We have no plans for home improvement projects.

Home improvement is a continuous process: paint peels, electrical wiring becomes inadequate, water heaters break down, etc. Projects are also undertaken to restore the home to its accustomed appearance and condition. In addition, people upgrade their homes by major additions and renovations.

One indication that home improvement is, at least in part, a carefully considered, step-by-step process is shown in Table 1.1: nearly one-half (47%) of the households which plan a home improvement project for the next year had already undertaken one in the past year.

This most active home improvement market segment amounted to one-eighth (13%) of all American households (see Table 1.2). Again, upper-income ($30,000+) respondents, those aged 35-49, homeowners, households with three or more members, households with at least two working adults, and residents of the West were all more likely than their counterparts both to have recently done and to be planning home improvement projects for the next 12 months.

Table 1.2

HOME IMPROVEMENT PLANS AND ACTIVITIES:
PAST YEAR AND NEXT YEAR

	Plan/ Have Done	Plan/ Have Not Done	Done/ Do Not Plan	Neither Plan Nor Have Done
Total	13%	14%	17%	56%
By Income				
Under $15,000	5%	5%	9%	81%
$15,000-$19,999	8	20	19	54
$20,000-$29,999	13	16	14	57
$30,000-$39,999	24	19	16	42
$40,000+	20	17	25	38
By Age				
18-24	10	16	16	58
25-34	17	16	16	52
35-49	19	20	19	42
50-64	12	13	21	54
65+	2	5	12	81
By Sex				
Male	13	16	16	54
Female	13	13	17	58
By Region				
Northeast	13	15	17	56
North central	13	16	16	56
South	12	12	16	61
West	15	18	19	48
By Home Ownership				
Own	15	16	21	49
Rent	9	10	7	75
By Household Size				
One	4	10	10	76
Two	11	11	19	59
Three	16	18	15	50
Four or more	17	19	19	46
By Number Working				
None	5	7	13	75
One	13	14	16	57
Two or more	17	19	19	45
By Past 12 Months Home Improvement Activities	44	=	56	=
DIY only	50	-	50	-
Contractor only	29	-	71	-
Both	39	-	61	-
DIY (Net)	48	-	52	-
Contractor (Net)	32	-	68	-
Plan Home Improvement Projects For Next 12 Months	47	53	-	-

SECTION TWO - PROJECTS DONE IN THE PAST 12 MONTHS

This section analyzes the home improvement projects done in the past 12 months: the types of projects, whether this work was done by members of the household or by contractors, and how much money was spent in total on these projects.

Respondents who stated that they had done some home improvement work within the past 12 months (29% of all adults) were asked which projects they had done, whether these were do-it-yourself projects or done by a contractor, and how much they had spent on all these projects.

One-third (36%) of all those who had done home improvement projects in the past 12 months did "general" projects, for example, major remodeling or the addition of a room to their residence (see Table 2.1). The general projects most frequently undertaken were adding a deck, patio, or porch (9%), remodeling a bathroom (8%), remodeling the kitchen (6%), and adding a room (5%).

Table 2.1

PROJECTS DONE IN PAST 12 MONTHS

Base: Did Projects In Past 12 Months	Total* (312)
General Projects (Net)	36%
Add deck/patio/porch	9
Remodel bathroom	8
Remodel kitchen	6
Add a room	5
Remodel basement	3
Add a bathroom	2
Partial Projects (Net)	75%
Interior painting	19
Exterior painting	11
Wall to wall carpeting/ room sized rugs	9
Painting (not specified)	8
Wall paper/wall coverings	8
Roofing	7
Landscaping	7
Plumbing	6
Windows	5
Doors	5
Complete remodeling/remodel	5
Faucets	5
Wall paneling	4
Refinish floors	4
Outdoor/exterior siding	4
Central heating gas/oil	3
Electrical wiring	3
Don't know/no answer	8

* Note: Multiple responses are possible.

Question: "What home improvement projects were done in the past 12 months?"

Three-fourths (75%) of those who had done home improvement projects in the past year did "partial" projects, which tend to be of more limited scope. One example of a partial project is wall paper or wall coverings. Partial projects can range from an inexpensive replacement of a faucet to relatively expensive projects, such as landscaping.

The most frequently mentioned partial projects were interior painting (19%), exterior painting (11%), wall-to-wall carpeting or room sized rugs (9%), painting in general (8%), and wall paper or wall coverings (8%).

Respondents with household incomes of $30,000-$39,999 (47%), members of three-person households (47%), residents of the Northeast (47%), 35-49 year olds (45%), men (42%), and homeowners (39%) were all more likely than their counterparts to have undertaken general projects in the past 12 months (see Table 2.2).

Women (80%), residents of the Northeast and North Central regions (84% each), members of two-person households (83%) were all more likely to have undertaken partial projects in the past year. Respondents in all income and age groups were about equally likely to have undertaken partial projects.

Table 2.2

PROJECTS UNDERTAKEN IN THE PAST 12 MONTHS
AMONG DEMOGRAPHIC GROUPS

	General Projects	Partial Projects			
			Painting		
Total	36%	Total 75%	Total 35%	Interior 19%	Exterior 11%
By Income					
Under $20,000	16%	75%	38%	16%	13%
$20,000-$29,999	35	76	32	19	8
$30,000-$39,999	47	77	38	20	13
$40,000+	42	73	36	21	14
By Age					
18-24	23	77	34	19	6
25-34	40	78	41	24	11
35-49	45	71	34	17	13
50+	29	74	33	17	13
By Sex					
Male	42	70	37	16	12
Female	30	80	34	22	10
By Region					
Northeast	47	84	32	18	9
North central	29	84	36	20	15
South	31	71	36	21	11
West	40	62	35	18	9
By Home Ownership					
Own	39	75	35	20	13
Rent	15	73	33	17	4
By Household Size					
One	28	68	20	4	10
Two	23	83	35	18	12
Three	47	65	27	19	10
Four or more	43	75	42	25	11
By Number Working					
None	25	79	25	19	6
One	38	77	36	17	11
Two or more	37	72	37	21	13
Plan Home Improvement Projects For Next 12 Months	40	77	32	23	8
By Newspaper Readership					
Frequent reader	32	77	38	20	14
Infrequent reader	42	71	30	19	7
Past Sunday reader	31	78	37	21	13

Base = Undertook home improvement projects in past 12 months.

Painting was the most frequently-done partial project: 35 percent of the households which did any home improvement in the past year painted or stained some part of their residence. Interior painting was done by a higher proportion of respondents than was exterior painting (19% and 11%, respectively). Further details are shown in Table 2.2.

Exterior painting was done by a higher proportion of well-to-do ($30,000+) households, by two-income families, and of course, by homeowners. Since these groups are the prime audience for the daily newspaper, frequent weekday readers were more likely than infrequent readers to have painted the outside of their residences in the past year (14% and 7%, respectively).

Three-fifths (62%) of those who undertook home improvement projects in the past 12 months carried out do-it-yourself (DIY) projects only, one-fourth (24%) had contractors do all the work, and 14 percent both hired a contractor and did some of the work themselves (see Table 2.3). Thus, three-fourths (76%) of the respondents did at least one DIY project and two-fifths (38%) hired a contractor.

As expected, lower-income (under $20,000) households were more likely than their counterparts both to have undertaken DIY projects rather than to have hired a contractor (87% and 23%, respectively). By way of contrast, upper-income ($40,000+) households were disproportionately

Table 2.3

WHO WORKED ON HOME IMPROVEMENT PROJECTS
AMONG DEMOGRAPHIC GROUPS

	DIY Only	Contractor	Both	Net DIY	Net Contractor
Total	62%	24%	14%	76%	38%
By Income					
Under $20,000	77%	13%	9%	87%	23%
$20,000-$29,999	69	15	14	83	29
$30,000-$39,999	68	17	15	83	33
$40,000+	48	35	17	65	52
By Age					
18-24	64	16	19	84	36
25-34	72	18	8	80	27
35-49	69	18	13	82	31
50+	47	35	19	65	54
By Sex					
Male	69	18	13	82	31
Female	55	29	15	70	44
By Region					
Northeast	63	22	15	78	37
North central	55	27	18	74	45
South	63	26	10	73	36
West	67	19	14	81	33
By Home Ownership					
Own	58	26	16	74	42
Rent	82	12	3	85	15
By Household Size					
One	65	31	4	69	35
Two	55	31	14	69	45
Three	65	19	14	79	33
Four or more	65	19	17	82	35
By Number Working					
None	62	30	8	70	38
One	63	25	11	73	36
Two or more	61	21	18	79	39
By Past 12 Months DIY Activity					
DIY (Net)	82	-	19	100	19
Contractor (Net)	-	63	37	37	100
By Newspaper Readership					
Frequent reader	53	29	18	71	46
Infrequent reader	78	15	8	85	23
Past Sunday reader	58	25	16	75	41

Question: "Did you or other members of your household do this work yourselves or did you hire a contractor to do it for you?"

likely (52%) to have hired contractors to do at least some of their home improvement projects.

Two demographic groups which are more likely to have lower household incomes--younger (18-24) respondents and renters--were also more likely to undertake do-it-yourself projects (84% and 85%, respectively) and less likely to hire contractors (36% and 15%, respectively). Men (82%) and residents of the West (81%) were also more likely to have been involved in do-it-yourself home improvement projects in the past 12 months.

About one-fourth of those who undertook home improvement projects in the past year spent less than $500 (24%), or between $500 and $2,499 (28%) in total (see Table 2.4). Approximately equal proportions of households spent $2,500-$4,999 (17%) or $5,000-plus (19%). (The remainder didn't answer this question.)

Not surprisingly, available income strongly affects the amount of money spent on home improvement projects. One-third (32%) of households with incomes in excess of $40,000 spent at least $5,000. Conversely, one-half (54%) of households with incomes under $20,000 spent $500 or less on home improvement projects in the last 12 months. Older (50+) respondents and homeowners were correlatively more likely to spend more on home improvements.

Table 2.4

AMOUNT SPENT ON ALL HOME IMPROVEMENT PROJECTS
IN THE PAST 12 MONTHS

	Under $500	$500-$2499	$2500-$4999	$5000+	DK/NA
Total	24%	28%	17%	19%	12%
By Income					
Under $20,000	54%	22%	9%	7%	7%
$20,000-$29,999	21	36	18	11	14
$30,000-$39,999	20	27	24	19	10
$40,000+	15	27	17	32	9
By Age					
18-24	38	25	7	17	14
25-34	27	34	13	20	6
35-49	24	31	21	12	12
50+	15	21	21	24	19
By Sex					
Male	23	28	24	20	5
Female	26	27	10	18	19
By Region					
Northeast	23	20	17	23	17
North central	28	30	20	18	4
South	24	35	15	12	15
West	22	24	15	26	13
By Home Ownership					
Own	19	29	19	21	11
Rent	53	21	1	7	18
By Household Size					
One	32	24	6	23	15
Two	24	26	14	23	12
Three	20	26	20	14	20
Four or more	25	31	19	18	8
By Number Working					
None	30	19	17	13	21
One	28	29	14	16	13
Two or more	20	30	19	23	9
By Newspaper Readership					
Frequent reader	19	32	20	20	9
Infrequent reader	33	21	11	17	19
Past Sunday reader	22	31	18	21	9

Question: "Just making a rough guess, about how much money did you spend on all these home improvement projects in the past 12 months?"

Two-thirds (68%) of those who did general projects in the past year did all their projects on a do-it-yourself basis; the comparable figure for partial projects was 61 percent (see Table 2.5).

Table 2.5

DO-IT-YOURSELF ACTIVITY IN PAST 12 MONTHS
BY PROJECT TYPE

			Partial Projects		
		General		Painting	
	Total	Projects	Total	Total	Interior
Base: Did Projects In Past 12 Months	(312)	(114)	(234)	(110)	(59)
DIY only	62%	68%	61%	66%	70%
Contractor only	24	18	24	13	13
Both	14	15	15	21	17
DIY (Net)	76%	82%	76%	87%	87%
Contractor (Net)	38	33	39	34	30

General projects usually cost more than partial projects. Households that did general projects were more likely than those doing partial projects to have spent at least $5,000 on their residences last year (28% vs. 16%, respectively). The former were also less likely to have limited their expenditures to under $500 (see Table 2.6).

Painting was a relatively inexpensive partial project: one-third (35%) of the households that painted in the past 12 months spent under $500 in total on their home improvements.

Table 2.6

TOTAL AMOUNT SPENT ON PROJECTS IN PAST 12 MONTHS
BY PROJECT TYPE

Base: Did Projects In Past 12 Months	Total (312)	General Projects (114)	Partial Projects Total (234)	Partial Projects Painting Total (110)	Partial Projects Painting Interior (59)
Under $500 (Net)	24%	15%	28%	35%	35%
Under $100	7	6	8	8	10
$100-$249	10	4	11	16	14
$250-$499	7	5	9	12	11
$500-$2,499 (Net)	28	22	27	26	24
$500-$999	11	8	10	10	5
$1,000-$2,499	17	15	17	16	19
$2,500-$4,999	17	24	17	20	18
$5,000+ (Net)	19	28	16	11	14
$5,000-$9,999	7	6	7	6	6
$10,000+	12	22	8	5	8
Don't know/no answer	12	11	12	8	10
	100%	100%	100%	100%	101%

Table 2.7 presents data on spending for home improvement as a function of do-it-yourself activity. As expected, people who undertook only DIY projects were more likely than people who hired contractors to have limited their home improvement expenditures to under $500 (35% vs. 9%). By way of contrast, one-third (31%) of the households that only hired contractors spent at least $5,000 on their projects in the past year.

Table 2.7

TOTAL AMOUNT SPENT ON PROJECTS IN PAST 12 MONTHS
BY DO-IT-YOURSELF ACTIVITY

Base: Did Projects In Past 12 Months	DIY Only (189)	Contractor Only (77)	Both (45)	Net DIY (234)	Net Contractor (122)
Under $500 (Net)	35%	9%	3%	29%	6%
Under $100	11	4	-	8	2
$100-$249	15	2	-	12	2
$250-$499	10	3	3	9	3
$500-$2,499 (Net)	27	24	41	29	31
$5900-$999	13	7	10	13	8
$1,000-$2,499	14	17	31	17	23
$2,500-$4,999	14	20	24	16	22
$5,000+ (Net)	13	31	25	15	29
$5,000-$9,999	5	10	15	7	12
$10,000+	9	21	10	9	17
Don't know/no response	11	16	8	11	13

SECTION THREE - PROJECTS PLANNED FOR THE NEXT 12 MONTHS

This section analyzes data on home improvement projects planned for the coming year. As with projects done in the past 12 months, those who said that they expect to undertake home improvement projects in the next 12 months were asked which projects they plan to do, whether these would be do-it-yourself projects or done by contractors, and how much they expected to spend on all these projects.

Two-fifths (40%) of the respondents who expect to undertake home improvement projects in the next 12 months were planning "general" projects (see Table 3.1). Four types of home improvements -- adding a desk, patio, or porch, remodeling the bathroom, remodeling the kitchen, and adding a room -- were the ones most frequently mentioned (8% each).

Over two-thirds (70%) of those planning projects expect to do "partial" projects. The most likely projects were interior painting (16%), exterior painting (13%), painting in general (8%), landscaping (8%), and wall-to-wall carpeting or room-sized rugs (7%).

Table 3.1

PROJECTS PLANNED FOR THE NEXT 12 MONTHS

Base: Plan Projects For Next 12 Months	Total* (284)
General Projects (Net)	40%
Add deck/patio/porch	8
Remodel bathroom	8
Remodel kitchen	8
Add a room	8
Remodel basement	3
Add a bathroom	2
Add garage	2
Partial Projects (Net)	70%
Interior painting	16
Exterior painting	13
Painting (not specified)	8
Landscaping	8
Wall to wall carpeting/ room sized rugs	7
Wall paper/wall coverings	6
Roofing	6
Plumbing	4
Windows	4
Refinish floors	4
Complete remodeling/remodel	3
Faucets	3
Electrical wiring	3
Outdoor/exterior siding	3
Driveway/paving	3
Don't know/no answer	10

* Note: Multiple responses are possible.

Question: "What projects do you expect to do in the next 12 months?"

The demographics of those planning general projects were similar to those who did projects in the past 12 months: upper-income ($30,000-$39,999) respondents, 25-49 year olds, members of larger (4+) households, and residents of the Northeast were all more likely than their counterparts to be planning general projects (see Table 3.2).

Respondents 50 years of age and older were more likely to be planning a partial project and less likely to plan a general project in the next 12 months than were the younger age groups. Expectations of doing at least one partial project were greatest among lower-income (under $20,000) and one-person households.

One-third (34%) of respondents who expect to undertake any home improvement projects in the next 12 months plan to paint. They are almost evenly divided between interior and exterior painting projects (16% and 13%, respectively).

Women, lower-income (under $20,000) respondents, and renters were disproportionately likely to plan interior painting. Since members of these groups are less likely than their counterparts to be frequent readers of a daily newspaper, infrequent readers are more likely than frequent readers to expect to do interior painting in the next year (21% and 12%, respectively).

Table 3.2

PROJECTS PLANNED FOR THE NEXT 12 MONTHS
AMONG DEMOGRAPHIC GROUPS

		Partial Projects			
	General		Painting		
	Projects	Total	Total	Interior	Exterior
Total	40%	70%	34%	16%	13%
By Income					
Under $20,000	24%	78%	42%	24%	12%
$20,000-$29,999	32	76	32	17	15
$30,000-$39,999	48	70	37	17	17
$40,000+	45	66	29	10	11
By Age					
18-24	26	73	38	17	16
25-34	48	62	33	17	7
35-49	45	70	31	13	12
50+	29	78	37	17	20
By Sex					
Male	39	71	31	9	13
Female	41	69	36	23	13
By Region					
Northeast	46	70	25	18	2
North central	39	74	40	20	20
South	36	67	33	7	15
West	40	69	35	20	13
By Home Ownership					
Own	44	69	30	13	14
Rent	23	74	51	27	10
By Household Size					
One	41	78	46	17	10
Two	30	75	39	20	18
Three	37	77	36	17	16
Four or more	47	61	26	11	10
By Number Working					
None	23	82	37	24	17
One	36	76	41	19	13
Two or more	46	64	28	12	13
By Newspaper Readership					
Frequent reader	38	72	30	12	13
Infrequent reader	42	68	39	21	14
Past Sunday reader	41	73	37	17	15

Base = Plan to undertake home improvement projects in the next 12 months.

Two-thirds (66%) of the households planning home improvement projects for the next 12 months expect to undertake only do-it-yourself projects, one-fourth (23%) plan to hire contractors to do all the work, and 9 percent stated that they will hire contractors and undertake some of the work themselves (see Table 3.3). Thus, three-fourths (74%) of those planning home improvement projects expect to undertake DIY projects and one-third (32%) will hire a contractor.

The demographics of those planning do-it-yourself projects vs. hiring of contractors is quite similar to that for those who did a project in the past year. Men (71%), those below age 35 (73%), renters (76%), larger households (74%), two-income households (72%), and those with household incomes under $20,000 (73%) were all more likely to be planning only do-it-yourself projects and less likely to hire a contractor.

One-fifth (22%) of those planning home improvement projects for the next 12 months expect to spend under $500 and 30 percent plan to spend between $500 and $2,499 (see Table 3.4). An additional 11 percent expect to spend $2,500-$4,999 or $5,000-plus (20%). One-sixth (17%) were unable to estimate their expenditures for home improvement projects in the next year.

Table 3.3

WHO PLANS TO WORK ON HOME IMPROVEMENT PROJECTS
AMONG DEMOGRAPHIC GROUPS

	DIY Only	Con-tractor	Both	Net DIY	Net Con-tractor
Total	66%	23%	9%	74%	32%
By Income					
Under $20,000	73%	16%	8%	82%	24%
$20,000-$29,999	64	28	8	72	36
$30,000-$39,999	82	13	5	87	18
$40,000+	57	24	14	70	38
By Age					
18-24	75	14	7	81	20
25-34	71	16	11	81	27
35-49	66	26	7	74	33
50+	56	32	10	66	42
By Sex					
Male	71	21	6	76	27
Female	60	25	12	72	37
By Region					
Northeast	63	35	2	65	37
North central	63	23	12	75	35
South	67	20	9	76	28
West	70	17	12	82	28
By Home Ownership					
Own	63	26	9	73	35
Rent	76	12	5	82	17
By Household Size					
One	64	28	5	69	32
Two	57	31	10	68	41
Three	62	29	7	69	36
Four or more	74	14	10	83	24
By Number Working					
None	55	34	12	67	46
One	60	29	9	68	37
Two or more	72	18	8	80	26
By Newspaper Readership					
Frequent reader	63	27	9	72	36
Infrequent reader	70	19	8	78	27
Past Sunday reader	67	22	9	76	31

Question: "Do you or other members of your household plan to do this work yourselves or do you plan to hire a contractor to do it for you?"

Table 3.4

AMOUNT PLAN TO SPEND ON ALL HOME IMPROVEMENT PROJECTS
IN THE NEXT 12 MONTHS

	Under $500	$500-$2499	$2500-$4999	$5000+	DK/NA
Total	22%	30%	11%	20%	17%
By Income					
Under $20,000	35%	27%	6%	14%	18%
$20,000-$29,999	20	40	9	13	18
$30,000-$39,999	30	32	4	21	14
$40,000+	15	23	19	30	14
By Age					
18-24	34	12	12	13	29
25-34	19	36	6	22	17
35-49	21	31	12	21	16
50+	19	35	10	24	12
By Sex					
Male	26	25	15	22	12
Female	17	35	6	19	23
By Region					
Northeast	19	17	10	31	23
North central	27	35	8	17	13
South	22	32	13	16	17
West	19	34	9	20	17
By Home Ownership					
Own	18	32	12	23	16
Rent	39	22	6	8	25
By Household Size					
One	33	29	5	16	17
Two	20	27	14	20	19
Three	18	33	9	23	18
Four or more	23	30	10	21	16
By Number Working					
None	37	27	6	21	10
One	21	29	11	23	16
Two or more	20	32	11	18	20
By Planned DIY Activity					
DIY (Net)	28	32	8	18	15
Contractor (Net)	4	27	19	33	17
By Newspaper Readership					
Frequent reader	21	32	12	22	13
Infrequent reader	22	28	9	18	23
Past Sunday reader	23	29	11	20	17

Question: "Just making a rough guess, about how much money do you plan to spend on these projects, in total?"

As expected, income levels affect planned expenditures for home improvement projects. Upper-income ($40,000+) respondents show the highest proportion of "$5,000+" and the lowest percentage of "under $500" answers (30% and 15%, respectively). Homeowners (23%), residents of the Northeast (31%), and those who expect to hire contractors (33%) were also more likely than their counterparts to estimate home improvement costs in excess of $5,000.

Similar proportions of people planning general projects (69%) and partial projects (65%) expect to do all their own work on home improvement projects in the upcoming 12 months (see Table 3.5). Three-fourths (73%) of those planning to paint expect their home improvement activities to be DIY projects. Interior painting was particularly likely (80%) to be a DIY undertaking.

General projects were estimated to cost more than partial projects: one-third (33%) of those planning general projects, but only one-sixth (16%) of those planning partial projects, expected total home improvement expenditures in the next 12 months to exceed $5,000 (see Table 3.6). Painting (particularly interior painting) was expected to be a relatively inexpensive project. And as was true of projects completed in the past year, do-it-yourself projects are expected to be less costly than those involving a contractor (see Table 3.7).

Table 3.5

DO-IT-YOURSELF ACTIVITY PLANNED FOR THE NEXT 12 MONTHS
BY PROJECT TYPE

Base: Plan Projects For Next 12 Months	Total (284)	General Projects (114)	Partial Projects Total (199)	Partial Projects Painting Total (97)	Partial Projects Painting Interior (42)
DIY only	66%	69%	65%	73%	80%
Contractor only	23	22	23	17	16
Both	9	8	11	10	4
DIY (Net)	74%	77%	75%	82%	84%
Contractor (Net)	32	30	34	26	20

Table 3.6

TOTAL AMOUNT PLANNED FOR PROJECTS IN THE NEXT 12 MONTHS
BY PROJECT TYPE

Base: Plan Projects For Next 12 Months	Total (284)	General Projects (114)	Partial Projects Total (199)	Partial Projects Painting Total (97)	Partial Projects Painting Interior (42)
Under $500 (Net)	22%	10%	24%	32%	31%
Under $100	5	-	5	7	6
$100-$249	7	2	8	9	16
$250-$499	10	8	11	15	9
$500-$2,499 (Net)	30	30	33	30	35
$500-$999	15	14	19	24	31
$1,000-$2,499	15	16	14	6	5
$2,500-$4,999	11	8	12	11	6
$5,000+ (Net)	20	33	16	13	9
$5,000-$9,999	10	16	8	4	-
$10,000+	10	17	8	9	9
Don't know/no answer	17	19	15	14	18
	100%	100%	100%	100%	99%

Table 3.7

TOTAL AMOUNT PLANNED FOR PROJECTS IN THE NEXT 12 MONTHS
BY PLANNED DO-IT-YOURSELF ACTIVITY

Base: Plan Projects For Next 12 Months	DIY Only (187)	Contractor Only (65)	Net DIY (213)	Net Contractor (91)
Under $500 (Net)	31%	4%	28%	4%
Under $100	7	-	6	-
$100-$249	10	2	9	1
$250-$499	14	2	13	2
$500-$2,499 (Net)	32	27	32	27
$500-$999	16	16	15	14
$1,000-$2,499	16	11	17	14
$2,500-$4,999	6	17	8	19
$5,000+ (Net)	15	32	18	33
$5,000-$9,999	8	11	10	14
$10,000+	6	20	7	19
Don't know/no response	16	21	14	16

SECTION FOUR - ATTITUDES TOWARD HOME IMPROVEMENT SHOPPING

This section analyzes the importance to consumers of certain attributes of home shopping centers and stores and the usefulness of five sources of information about home improvement products.

Importance Of Store Attributes

The most important attribute of a home improvement product store is "good service in general" -- 76 percent of adults rated this characteristic as "very important" in deciding where to shop for these products (see Table 4.1). Three other attributes -- "has good prices every day " (72% answering "very important"), "has helpful sales people (70%), and "has a large variety and selection of products (69%) -- were also rated as very important by high proportions of shoppers.

The three least significant influences on shopping decisions were "offers their own credit card" (11%), "is part of a store/mall where I can shop for other things at the same time" (25%), and "gives me good ideas for new projects" (31%).

Table 4.1

IMPORTANCE OF STORE ATIRIBUTES

	Very Important	Somewhat Important	Not Too Important	Not At All Important	DK/NA
Has good service in general	76%	19%	2%	2%	1%
Has good prices every day	72	20	4	2	2
Has helpful sales people	70	21	4	3	2
Has a large variety and selection of products	69	22	5	2	2
Is easy to get to	58	29	8	3	2
Has good special sales	53	30	11	4	2
Is a pleasant shopping experience	48	32	11	6	4
Gives me good ideas for new projects	31	32	19	14	4
Is part of a store/mall where I can shop for other things at the same time	25	27	27	18	2
Offers their own credit card	11	13	27	47	2

Question: "People shop for home improvement products at different kinds of stores. Please tell me how important each of these is to you, when you decide to shop for such products. Is it very important, somewhat important, not too important, or not at all important?"

People who had done home improvement projects during the past year were about as likely as others to rate good service, good prices, helpful sales people, and variety/selection as "very important" in deciding where to shop for home improvement products (see Table 4.2). There were only minor variations in the proportions rating these four characteristics as "very important" among people who undertook general vs. partial projects, did the work themselves vs. hired a contractor, and who spent different amounts on home improvement projects in the past 12 months.

People planning to undertake home improvement projects in the next 12 months also considered good service, good prices, helpful sales people, and variety/selection as the four most important attributes of stores selling home improvement products. People who plan to spend $2,500-plus (63%) were less likely than those who plan to spend $500-$2,499 (82%) or under $500 (78%) to consider a store's having helpful sales people to be "very important."

The consistency with which consumers of all types -- those who have recently been active and those who plan to be, as well as others who haven't done home improvements -- suggests that these are store and shopping benefits that are <u>generally</u> valued as more or less important when it comes to home improvement purchases.

Table 4.2

IMPORTANCE OF STORE ATTRIBUTES
BY HOME IMPROVEMENT PLANS/ACTIVITIES
(Proportion Answering "Very Important")

	Good Service	Good Prices	Helpful Sales People	Variety/ Selection	Easy To Get To
Total	76%	72%	70%	69%	58%
By Past 12 Months Home Improvement Activities	80%	78%	74%	75%	56%
By Project Type					
General	78	80	67	74	53
Partial	82	76	75	74	56
By DIY Activity					
DIY only	79	81	72	78	57
Contractor only	78	74	75	69	58
DIY (Net)	81	78	74	77	55
Contractor (Net)	83	72	77	70	53
By Amount Spent					
Under $500	78	83	73	72	53
$500-$2,499	79	75	77	77	61
$2,500-$4,999	77	73	66	78	58
$5,000+	84	76	73	73	47
By Next 12 Months Plans For Home Improvement Projects	81	75	75	70	57
By Project Type					
General	79	73	75	70	53
Partial	82	74	76	69	55
By Planned DIY Activity					
DIY (Net)	82	74	74	73	58
Contractor (Net)	75	75	75	60	53
By Amount Plan To Spend					
Under $500	86	75	78	77	54
$500-$2,499	82	79	82	71	57
$2,500+	76	70	63	64	55

(Continued)

"Good Service" : Has good service in general.
"Good Prices" : Has good prices every day.
"Helpful Sales People": Has helpful sales people.
"Variety/Selection" : Has a large variety and selection of products.
"Easy To Get To" : Is easy to get to.

Table 4.2

IMPORTANCE OF STORE ATTRIBUTES
BY HOME IMPROVEMENT PLANS/ACTIVITIES
(Proportion Answering "Very Important")
(Continued)

	Special Sales	Pleasant Shopping	Good Ideas	Store/ Mall	Credit Card
Total	53%	48%	31%	25%	11%
By Past 12 Months Home Improvement Activities	53%	47%	33%	20%	8%
By Project Type					
General	49	37	37	20	5
Partial	52	47	32	17	8
By DIY Activity					
DIY only	60	42	33	20	8
Contractor only	43	55	37	23	12
DIY (Net)	56	44	32	18	7
Contractor (Net)	41	54	33	18	8
By Amount Spent					
Under $500	60	45	27	22	13
$500-$2,499	52	44	31	17	7
$2,500-$4,999	45	43	33	15	7
$5,000+	48	52	41	18	6
By Next 12 Months Plans For Home Improvement Projects	53	48	36	17	11
By Project Type					
General	55	48	33	15	9
Partial	51	47	38	18	10
By Planned DIY Activity					
DIY (Net)	55	50	38	18	9
Contractor (Net)	45	39	30	14	14
By Amount Plan To Spend					
Under $500	42	56	35	17	7
$500-$2,499	56	47	37	20	8
$2,500+	51	43	31	14	12

"Special Sales" : Has good special sales.
"Pleasant Shopping": Is a pleasant shopping experience.
"Good Ideas" : Gives me good ideas for news projects.
"Store/Mall" : Is part of a store/mall where I can shop for other things at the same time.
"Credit Card" : Offers their own credit card.

Usefulness of Information Sources

Newspaper ads and home columns and features provide significant assistance to consumers. In fact, more people (40%) rated newspaper ads as a "very useful" source of information when they are thinking of buying home improvement products than any other source (see Table 4.3). Trailing newspaper ads in perceived usefulness were consumer guides (36%), advice from friends/relatives/neighbors (34%), and home columns in the local daily newspaper (24%). Mail advertising (19%) was least often seen as a very useful information source.

People who engaged in home improvement activities in the past year and those who plan a project for the next 12 months rated newspaper ads as the most useful source of shopping information -- 41% and 40%, respectively, said this source of information was "very useful" (see Table 4.4).

Those who undertook do-it-yourself projects were much more likely than those who hired contractors to rate newspaper ads as "very useful" (43% vs. 32%). People planning DIY projects were also much more likely than those planning to hire a contractor to say that newspaper ads were "very useful" (46% vs. 26%). Thus, for the largest proportion of active consumers, the newspaper is their prime shopping guide.

Table 4.3

USEFULNESS OF INFORMATION SOURCES

	Very Useful	Somewhat Useful	Not Too Useful	Not At All Useful	DK/NA
Newspaper ads run by local stores	40%	45%	8%	6%	1%
Consumer guides or reports on products	36	35	13	14	2
Advice from friends, relatives or neighbors	34	45	11	[illegible]	2
Home columns or features in the local daily paper	24	45	16	13	2
Advertisements mailed to home	19	37	21	21	2

Question: "When you are thinking about buying home improvement products, how useful are the following sources of information? Would you say (SOURCE) is very useful, somewhat useful, not too useful, or not at all useful?"

Table 4.4

USEFULNESS OF INFORMATION SOURCES
AMONG DEMOGRAPHIC GROUPS
(Proportion Answering "Very Useful")

	Newspaper Ads	Consumer Guides	Advice	Home Columns	Mail Ads
Total	40%	36%	34%	24%	19%
By Income					
Under $15,000	42%	41%	41	26%	22%
$15,000-$19,999	45	38	40	30	24
$20,000-$29,999	46	40	34	27	24
$30,000-$39,999	39	31	27	28	20
$40,000+	29	34	33	15	13
By Age					
18-24	32	31	34	19	20
25-34	37	36	32	21	28
35-49	40	39	34	23	23
50-64	42	33	36	29	11
65+	51	41	33	30	10
By Sex					
Male	37	33	34	20	20
Female	43	39	33	28	19
By Region					
Northeast	40	41	34	23	21
North central	37	33	30	23	15
South	43	36	36	25	22
West	38	34	34	27	19
By Home Ownership					
Own	40	36	34	23	18
Rent	41	36	33	28	23
By Household Size					
One	42	37	39	28	14
Two	40	37	31	26	17
Three	39	41	36	23	24
Four or more	39	31	32	22	22
By Number Working					
None	47	37	38	28	13
One	36	38	32	24	22
Two or more	39	33	33	22	21

(Continued)

Table 4.4

USEFULNESS OF INFORMATION SOURCES
AMONG DEMOGRAPHIC GROUPS
(Proportion Answering "Very Useful")
(Continued)

	Newspaper Ads	Consumer Guides	Advice	Home Columns	Mail Ads
Total	40%	36%	34%	24%	19%
By Past 12 Months Home Improvement Activities	41%	33%	31%	22%	19%
By Project Type					
General	35	31	27	20	23
Partial	40	31	33	23	16
By DIY Activity					
DIY only	47	31	32	22	23
Contractor only	34	37	25	26	13
DIY (Net)	43	31	33	21	20
Contractor (Net)	32	34	30	22	12
By Amount Spent					
Under $500	46	29	34	23	20
$500-$2,499	38	28	30	21	18
$2,500-$4,999	48	40	35	22	25
$5,000+	33	37	26	21	19
By Next 12 Months Plans For Home Improvement Projects	40	36	32	25	21
By Project Type					
General	31	34	31	18	22
Partial	41	37	33	27	20
By Planned DIY Activity					
DIY (Net)	46	35	31	25	22
Contractor (Net)	26	38	36	19	22
By Amount Plan To Spend					
Under $500	56	39	35	31	11
$500-$2,499	45	33	29	20	27
$2,500+	27	38	33	21	23

SECTION FIVE - NEWSPAPER READERSHIP

Overall, three-fifths (60%) of American adults were frequent daily newspaper readers and two-thirds (66%) read last Sunday's paper (see Table 5.1).

Consistent with the findings of previous NAB readership studies,* upper-income ($30,000+) respondents, people 35 and older, homeowners, and residents of the Northeast were all more likely to be frequent daily newspaper readers. People 35 and older, with household incomes of $30,000-plus, and homeowners were also more likely to have read last Sunday's paper.

Adults who did some home improvement work, particularly those who spent $500-plus, were more likely to be frequent daily newspaper readers. Sunday readership is particularly strong among past or prospective consumers. Those who plan to spend less on a home improvement project in the next 12 months were only slightly less likely than others to be frequent daily newspaper readers. The more people plan to spend, the greater their involvement with the daily newspaper.

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* See "Newspapers In American News Habits: A Comparative Assessment," (Newspaper Advertising Bureau, 1985).

Table 5.1

NEWSPAPER READERSHIP AMONG DEMOGRAPHIC GROUPS

	Frequent Readers*	Infrequent Readers*	Past Sunday Readers
Total	60%	40%	66%
By Income			
Under $15,000	50%	50%	60%
$15,000-$19,999	52	48	60
$20,000-$29,999	59	41	66
$30,000-$39,999	64	36	82
$40,000+	74	26	75
By Age			
18-24	39	61	61
25-34	49	51	64
35-49	65	35	68
50-64	71	29	68
65+	78	22	71
By Sex			
Male	62	38	65
Female	58	42	68
By Region			
Northeast	66	34	69
North central	62	38	69
South	57	43	67
West	56	44	60
By Home Ownership			
Own	68	32	69
Rent	41	59	60
By Household Size			
One	61	39	67
Two	69	31	71
Three	54	46	60
Four or more	55	45	66
By Number Working			
None	66	34	69
One	58	42	65
Two or more	59	41	66

(Continued)

Table 5.1

NEWSPAPER READERSHIP AMONG DEMOGRAPHIC GROUPS
(Continued)

	Frequent Readers*	Infrequent Readers*	Past Sunday Readers
Total	60%	40%	66%
By Past 12 Month Home Improvement Activities	64%	36%	74%
By Project Type			
General	57	43	65
Partial	65	35	77
By Amount Spent			
Under $500	51	49	66
$500-$2,499	73	27	82
$2,500-$4,999	77	23	78
$5,000+	67	33	80
By Next 12 Months Plans For Home Improvement Projects	57	43	70
By Project Type			
General	55	45	72
Partial	59	41	72
By Amount Plan To Spend			
Under $500	57	43	72
$500-$2,499	60	40	68
$2,500+	63	37	71

* Frequent readers are defined as those who read 4 or all 5 Monday-through-Friday editions of a daily newspaper. Infrequent readers are those who read 0 through 3 weekday editions of the daily paper.

Questions: "Please tell me whether or not you, yourself, have read or looked at a daily newspaper during each of the last seven days. Let's start with a week ago today, that is, last (DAY OF INTERVIEW). (IF SUNDAY INTERVIEW, LET'S START WITH LAST MONDAY.) Did you read a daily paper on (INSERT EACH DAY OF THE WEEK)?"

"Did you, yourself, read or look at any part of last Sunday's paper?" (IF SUNDAY INTERVIEW: "Today's paper?")

APPENDIX TABLES

Table A.1

RESPONDENT BASES
(Unweighted)

	Total (1019)	Did Projects (312)	Plan Projects (284)
Total			
By Income			
Under $15,000	163	24	18
$15,000-$19,999	113	30	33
$20,000-$24,999	126	32	41
$25,000-$29,999	109	34	30
$30,000-$39,999	142	55	57
$40,000-$49,999	90	42	31
$50,000-$74,999	95	45	41
$75,000+	45	19	10
No answer	136	31	23
By Age			
18-20	66	18	15
21-24	98	27	27
25-29	139	36	37
30-34	154	57	56
35-39	117	50	48
40-44	88	28	34
45-49	48	17	13
50-54	54	21	16
55-59	61	23	16
60-64	61	16	10
65+	111	17	9
No answer	22	2	3
By Sex			
Male	513	153	149
Female	506	159	135
By Region			
Northeast	212	65	54
North central	274	82	79
South	354	106	88
West	179	59	63
By Home Ownership			
Own	725	270	232
Rent	282	41	52
No answer	12	1	0

(Continued)

Table A.1

RESPONDENT BASES
(Unweighted)
(Continued)

	Total (1019)	Did Projects (312)	Plan Projects (284)
Total			
By Household Size			
One	167	28	28
Two	296	92	70
Three	208	65	69
Four	192	75	63
Five	94	32	32
Six or more	62	20	22
By Number Working			
None	192	36	26
One	374	110	98
Two	342	129	126
Three or more	111	37	34
By Past 12 Months DIY Activity			
DIY only		189	
Contractor only		77	
Both		45	
DIY (Net)		234	
Contractor (Net)		122	
By Amount Spent			
Under $100		22	
$100-$249		28	
$250-$499		23	
$500-$999		34	
$1,000-$2,499		57	
$2,500-$4,999		53	
$5,000-$9,999		25	
$10,000+		38	
No answer		32	

(Continued)

Table A.1

RESPONDENT BASES
(Unweighted)
(Continued)

Total	Total (1019)	Did Projects (312)	Plan Projects (284)
By Planned DIY Activity			
DIY only			187
Contractor only			65
Both			26
No answer			6
DIY (Net)			213
Contractor (Net)			91
By Amount Plan To Spend			
Under $100			14
$100-$249			19
$250-$499			26
$500-$999			45
$1,000-$2,499			44
$2,500-$4,999			30
$5,000-$9,999			28
$10,000+			28
No answer			50
By Newspaper Readership			
Frequent reader	605	200	165
Infrequent reader	414	112	119
Past Sunday reader	687	232	206

Table A.2

RESPONDENT PROFILES

Base: Total Respondents (Weighted)	Total (1008)	Did Projects (296)	Plan Projects (274)
By Income			
Under $15,000	18%	8%	7%
$15,000-$19,999	11	10	11
$20,000-$24,999	13	11	15
$25,000-$29,999	10	11	10
$30,000-$39,999	13	18	20
$40,000-$49,999	8	12	10
$50,000-$74,999	9	15	15
$75,000+	4	5	4
No answer	14	10	8
By Age			
18-20	6%	5%	6%
21-24	11	9	10
25-29	11	10	11
30-34	12	16	17
35-39	11	17	17
40-44	8	8	12
45-49	4	5	4
50-54	6	8	6
55-59	7	9	7
60-64	7	5	4
65+	16	7	4
No answer	2	1	1
By Sex			
Male	48%	48%	51%
Female	52	52	49
By Region			
Northeast	22%	22%	22%
North central	25	24	26
South	34	32	29
West	19	22	23
By Home Ownership			
Own	72%	86%	82%
Rent	27	14	18
No answer	1	*	-

(Continued)

* Less than 0.5%

Table A.2

RESPONDENT PROFILES
(Continued)

Base: Total Respondents (Weighted)	Total (1008)	Did Projects (296)	Plan Projects (274)
By Household Size			
One	18%	9%	9%
Two	31	32	25
Three	19	21	25
Four	17	23	23
Five	9	9	11
Six or more	5	6	7
By Number Working			
None	23%	14%	10%
One	37	37	36
Two	31	40	42
Three or more	10	10	12
By Amount Spent On Projects			
Under $100		7%	
$100-$249		10	
$250-$499		7	
$500-$999		11	
$1,000-$2,499		17	
$2,500-$4,999		17	
$5,000-$9,999		7	
$10,000+		12	
No answer		12	
By Amount Plan To Spend On Projects			
Under $100			5%
$100-$249			7
$250-$499			10
$500-$999			15
$1,000-$2,499			15
$2,500-$4,999			11
$5,000-$9,999			10
$10,000+			10
No answer			17
By Newspaper Readership			
Frequent reader	60%	64%	57%
Infrequent reader	40	37	43
Past Sunday reader	66%	74%	70%

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2/27

Newspaper Advertising Bureau, Inc.
1180 Avenue of the Americas
New York, New York 10036
212 921 5080

ONE DAY'S MAIL:

Advertising Mail And Its Treatment

This is one of a series of marketing research reports prepared by the Newspaper Advertising Bureau, Inc. as a service to the newspaper business and its advertisers.

The study was directed and the report written by Nicolas A. Bloom (with the assistance of Albert E. Gollin) of the Research Department.

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August 1987

INTRODUCTION

Daily newspapers face a growing competitive challenge from advertising sent by mail ("direct mail"), sometimes called direct response advertising, ad mail, or "junk mail." Although more is known about direct mail now than when an earlier NAB study was conducted (1982), it continues to be measured and analyzed for its consumer acceptance less often than other forms of advertising.

The purpose of this study of advertising mail is to obtain systematic data on the following topics:

- An inventory of the advertising mail received in households across the nation in one day's delivery;
- How advertising mail is treated;
- How consumers feel about the newspaper vs. mail advertising; and
- Comparative demographics of ad mail volume, how ad mail is treated, and attitudes toward the two advertising media.

Method And Sample

The Direct Ad Mail Study covered a random-digit-dial national probability sample survey of 867 households conducted in several waves in January 1986. The respondents were the first adults to look over the household mail. The first interview consisted of questions about the usual household mail, how they usually handle it, attitudes toward newspaper and mail advertising, and newspaper reading. Respondents were asked to hold one day's mail for a call-back interview.

In the first call-back interview (first half of January), respondents reported how much mail was received that day, and gave a detailed description of the advertising mail and the circulars which they intended to keep from that day's delivery. They were asked to send in all the ad mail and circulars which they did not want to keep. In addition, they were asked to send in all the ad mail addressed to all employed household members at their places of work. (Two postage-paid envelopes, one for ad mail and circulars, the other for business ad mail, had been sent to them with a cover letter and a new $5.00 bill, as an incentive for their cooperation.) In a second call-back interview, most of the respondents from the first call-back interview were contacted again and asked only for the amount of mail and whether or not they would keep each piece of ad mail they received on that day.

The first interview contained equal numbers of respondents from Sunday through Friday; the two waves of call-back interviews were equally distributed across the six mail delivery days, Monday through Saturday.

The samples for this study consisted of the following:

Respondents:	867	completed the first interview;
	658	completed the call-back interview -- first half of January;
	599	completed the call-back interview -- second half of January.
Ad Mail:	2016	pieces received -- 1456 in the first half and 560 in the second half of January.
	503	pieces were kept;
	1513	pieces were thrown away.
	1389	pieces with detailed physical descriptions (one day's mail -- first half of January).

Field work and tabulations were conducted by Henry Senft Research Associates, Port Washington, New York. A copy of the questionnaire is available on request from NAB.